CA-PMM

Project Name: Workload Growth 2009/2010

OCIO Project #: 1730-189
Department: Franchise Tax Board
Reporting Period: *From:*   *To:*

Team Member to Project Manager

Current Task Summary

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?
Accomplished this week			
Planned/Scheduled Completion in Next Two Weeks			

Status Summary	Yes/No	Explanation
Will all assigned tasks be accomplished by their due date?		
Are there any planned tasks that won't be completed?		
Are there problems which affect your ability to accomplish assigned tasks?		
Do you plan to take time off that is not currently scheduled?		

Status of Assigned Issues

Issue Number	Description	Due Date	Status

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Reporting Period: *From:* 1/10/09 *To:* 7/30/09

Project Manager to Sponsor

Current Status Report

Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	No	NCB is pending approval by DGS and release of purchase requests pending approval of the IT Acquisition Plan	Delay in Procurement	DGS approval
2. Were any key milestones or deliverables rescheduled?	No			
3. Was work done that was not planned?	No			
4. Were there any changes to scope?	No			
5. Were tasks added that were not originally estimated?	No			
6. Were any tasks or milestones removed?	No			
7. Were any scheduled tasks not started?	Yes	Procurement documents for the Mainframe and ECAIR Purchase requests can't be released due to the Executive Order.	Delay in Procurement	Release of purchase requests are pending approval of the IT Acquisition Plan
8. Are there any new major issues?	No			
9. Are there any staffing problems?	No			

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Project Manager to Sponsor

Look Ahead View

Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	No		
2. Do any key milestones or deliverables need to be rescheduled?	No		
3. Is there any unplanned work that needs to be done?	No		
4. Are there any expected or recommended changes to scope?	No		
5. Are there any tasks not originally estimated that will need to be added?	No		
6. Are there any tasks or milestones that should be removed from the plan?	No		
7. Are there any scheduled tasks whose start will likely be delayed?	Yes	Awarding of ECAIR contracts may be delayed.	Release of purchase requests are pending approval of the IT Acquisition Plan
8. Are any major new issues foreseeable?	No		
9. Are any staffing problems anticipated?	No		

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Current Status and Accomplishments:

*Describe deliverables completed and milestones met during **this reporting period.***

Final FSR approval was received 1/10/09. The actual project start date was March 10, 2009. Both Mainframe and ECAIR requirements have been developed. The ECAIR Technical Team has met with IBM to discuss and document hardware and software purchase needs. IBM has also assisted with gathering equipment needs for the Mainframe. The ITPP and NCB were completed and received in-house approval. External approvals of the ITPP have been received, although the department has not received approval of the NCB by DGS at this time. Once NCB approval is received and the department receives approval of the IT Acquisition Plan, FTB will request authority to begin procurment of software and hardware needs for this project.

Project Milestones:

List key milestones and their dates from the project schedule.

Milestone	Target Date	Forecast Date	Status	Cause & Impact to Implementation Date	Date Completed
Please see attached Project Schedule					

Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	X			
Milestones	X			
Deliverables	X			
Resources	X			
OneTime Cost	X			

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Project Manager to Sponsor

Continuing Cost	X			

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Project Manager to Sponsor

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Reporting Period: *From:* 1/10/09   *To:* 7/30/09

Sponsor to Executive Committee

Summary Milestones and Highlights

Project Milestones:

List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.

Milestone	Target Date	Forecast Date	Status	If Delayed, Impact to Implementation Date	Date Completed
Please see attached Project Schedule					

Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

* *Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis*

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	X			
Milestones	X			
Deliverables	X			
Resources	X			
One Time Cost	X			
Continuing Cost	X			

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Monitoring Vital Signs Scorecard

Vital Sign	Variance	Value	Your Score	Score Justification
1. Customer Buy-In	High Degree of Buy-In	0	**0** Green	
	Medium Degree of Buy-In	1		
	Low Degree of Buy-In	2		
2. Technology Viability	Strong Viability	0	**0** Green	
	Medium Viability	1		
	Weak Viability	2		
3. Status of the Critical Path (delay)	<5%	0	**0** Green	
	5% to 10%	1		
	>10%	2		
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	**0** Green	
	5% to 10%	1		
	>10%	2		
5. High-Probability, High-Impact Risks	0 to 3	0	**0** Green	
	4 to 6	1		
	>6	2		
6. Unresolved Issues (on time resolution)	On time	0	**0** Green	
	Late with no impact	1		
	Late impacting the critical path	2		
7. Sponsorship Commitment	Fully engaged	0	**0** Green	
	Partially engaged	1		
	Inadequate engagement	2		
8. Strategy Alignment	Strong alignment	0	**0** Green	
	Partial alignment	1		
	Weak or no alignment	2		
9. Value-to-Business	Strong	0	**0** Gree	
	Medium	1		

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	Weak	2	5

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Sponsor to Executive Committee

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10. Vendor Viability (provide rationale for the rating in the field following the scorecard)	Strong	0	**0** Green	
	Medium	1		
	Weak	2		
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	**0** Green	
	80-90% on time	1		
	<80% on time	2		
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	**0** Green	
	80-90% on time	1		
	<80% on time	2		
13. Actual vs. Planned Resources	>90% assigned and available	0	**0** Green	
	80-90% assigned and available	1		
	<80% assigned and available	2		
14. Overtime Utilization (% of effort that is overtime)	<15%	0	**0** Green	
	15-25%	1		
	>25%	2		
15. Team Effectiveness	Highly Effective	0	**0** Green	
	Moderately Effective	1		
	Ineffective	2		
		Total	**0**	**G**

Green = 0 - 8
Yellow = 9 - 19
Red = 20+

Vendor Viability Rating Rationale

0

Milestone and Deliverable	Approved Start Date	Actual Start Date	Approved Completion Date	Actual Completion Date
Obtain **Internal** FSR approval	7/14/2008	7/14/2008	7/14/2008	7/14/2008
Obtain **External** FSR approval	7/15/2008	7/15/2008	1/20/2009	1/10/2009
Start Project	1/20/2009	3/10/2009	1/20/2009	3/17/2009
Develop Mainframe Requirements	1/20/2009	3/10/2009	3/1/2009	3/17/2009
Develop ECAIR Requirements	1/20/2009	3/10/2009	3/15/2009	3/17/2009
Develop ITPP	1/20/2009	3/17/2009	3/1/2009	3/31/2009
Obtain approval of ITPP	3/1/2009	4/6/2009	4/1/2009	6/17/2009
Develop NCB Contract Justification for Mainframe Hardware and ECAIR Contract Services for Installation and Training	4/1/2009	4/8/2009	5/1/2009	4/20/2009
Develop and Release Mainframe for Requests for Pricing for Proprietary Software	4/1/2009		8/31/2009	
Develop and Release ECAIR Request for Offers Documents for Hardware and Software	5/1/2009		7/1/2009	
Award Mainframe Procurement Contract for Hardware and ECAIR Consultant Services for Installation and Training	8/1/2009		9/1/2009	
Award Multiple Mainframe Proprietary Software Contracts	4/15/2009		8/31/2009	
FY 2009/10				
Award ECAIR Procurement Contracts for Hardware and Software	7/15/2009		10/1/2009	
Install/Configure Mainframe Hardware/Software	9/1/2009		9/30/2009	
Install/Configure ECAIR Hardware/Software	9/1/2009		11/15/2009	
Test Mainframe	10/1/2009		10/30/2009	
Test ECAIR Hardware/Software	11/17/2009		12/30/2009	
System Acceptance - Mainframe	11/1/2009		12/29/2009	
Training - ECAIR	8/1/2009		9/1/2009	

Implement into Operation - Mainframe	11/28/2009		11/30/2009	
Implementation- ECAIR	1/2/2010		5/30/2010	
Project Complete	6/1/2010		6/30/2010	
Conduct Project Retrospective	7/30/2010		8/30/2010	
Prepare Post Implementation Evaluation Report (PIER)	2/1/2011		5/1/2011	

Percent Complete
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